

## **Argentina Telecom MNO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Argentina Telecom MNO Market Analysis

The Argentina Telecom MNO Market size in 2026 is estimated at USD 6.19 billion, growing from 2025 value of USD 5.89 billion with 2031 projections showing USD 7.96 billion, growing at 5.18% CAGR over 2026-2031.

The current expansion rests on three pillars: rapidly rising mobile-data usage on 4G and 5G networks, renewed tariff flexibility following the repeal of price caps, and a fresh wave of enterprise digitalization programs across agriculture, mining, and manufacturing. Operators have redirected capital toward nationwide fiber backbones and dense radio-access upgrades, a shift that shortens latency, reduces dropped-call ratios, and boosts average data speeds for both urban and rural customers. The Argentina telecom MNO market also benefits from a supportive spectrum roadmap that unlocks contiguous 3.5 GHz blocks and commits public-sector funds to rural coverage, allowing carriers to time their rollouts in line with cash-flow conditions. At the same time, operators face elevated inflation, which erodes ARPU in real terms, yet they mitigate pressure through USD-denominated premium plans and enterprise IoT contracts that preserve hard-currency revenue streams. Convergent quad-play bundles further strengthen retention by integrating fixed broadband, mobile, pay-TV, and VoIP into single bills that cushion households from unpredictable monthly price swings.

Argentina Telecom MNO Market Trends and Insights

Explosive Mobile-Data Consumption on 4G/5G Networks

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Total cellular-data traffic more than doubled between 2023 and 2025 as video streaming, mobile gaming, and agricultural sensor feeds converged on upgraded LTE and early 5G carriers. Median download speeds on Personal's 5G network hit 432 Mbps, confirming the platform's ability to support bandwidth-hungry enterprise and consumer applications. Farmland IoT pilots rely on low-power wide-area modules that upload soil-moisture and crop-health readings every fifteen minutes, generating steady, high-margin traffic even during macroeconomic slowdowns. Operators use dynamic spectrum-sharing to re-farm 1,800 MHz bands, squeezing extra capacity out of existing assets while the 3.5 GHz grid densifies in metropolitan corridors. These developments secure data-centric revenue streams and reinforce the long-term relevance of the Argentina telecom MNO market.

#### 5G Spectrum Auctions and Fibre-Backbone Build-Out

The 2024 spectrum tender released 100 MHz from state-owned ARSAT and an additional 50 MHz from ENACOM, bundling coverage obligations with discounted reserve prices to make deployments financially workable. Winning bidders receive staggered payment schedules and 12-year licenses, enabling cost recovery over a full depreciation cycle. Parallel fiber builds interconnect 1-Tbps metro rings with 400-Gbps long-haul links, creating the backhaul headroom needed for massive-MIMO cell sites. Claro alone allocated USD 200 million to extend AI-enabled fiber deeper into edge nodes, accelerating the transition to network-function virtualization and cloud-native cores. Taken together, these infrastructure moves add 0.8 percentage points to the projected CAGR of the Argentina telecom MNO market.

#### Hyper-Inflation Diluting ARPU in Real Terms

The consumer-price index rose above 100% in 2024, outpacing nominal tariff hikes and slicing 7.7% off sector revenue once adjusted for inflation. Pre-paid SIMs now represent 61% of all mobile lines, indicating a flight to usage-controlled plans that keep discretionary spend in check. Operators partially insulate margins by pegging premium 5G tiers to the U.S. dollar, thereby shielding higher-income customers from peso volatility. They also broaden wholesale fiber sales and cloud-managed security to stabilize enterprise cash flows. However, the drag on mass-market purchasing power remains the single largest brake on the Argentina telecom MNO market, shaving 1.8 percentage points from forecast growth.

Other drivers and restraints analyzed in the detailed report include:

Enterprise Digitalization and IoT Connectivity Demand  
Uptake of Convergent Quad-Play Bundles  
High Import Duties on 5G RAN Equipment

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Data and internet services generated 62.08% of Argentina telecom MNO market share in 2025, a proportion that rises steadily as voice minutes migrate to OTT calling and rich-media apps. The segment benefits from nationwide 4G population coverage exceeding 99% and growing 5G pockets that handle immersive video and enterprise sensor streams. In numerical terms, data contracts contributed USD 3.66 billion to the Argentina telecom MNO market size during 2025. IoT and M2M lines posted the fastest expansion, logging a 5.32% CAGR outlook to 2031 on the back of agriculture, mining, and manufacturing automation projects. Operators package data with cloud-storage and edge analytics, converting what was once a commodity pipe into a multi-layer service stack with higher per-connection margins.

Messaging, VAS, and roaming revenues continue to fade as customers adopt app-based communication and remote-work platforms that bypass legacy SMS frameworks. Still, roaming rebounds during outbound tourism spikes, aided by simplified

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regional rate plans that keep travelers on-net. Pay-TV's integration into mobile bundles secures incremental stickiness despite intense streaming rivalry. Collectively, the evolving service portfolio underlines the Argentina telecom MNO market's pivot toward digital solutions capable of monetizing bandwidth, latency, and security rather than pure minutes of use.

The Argentina Telecom MNO Market is Segmented by Service Type (Voice Services, Data and Internet Services, Messaging Services, IoT and M2M Services, OTT and PayTV Services, Other Services), End User (Enterprises, Consumers). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Subscribers).

List of Companies Covered in this Report:

Personal (Telecom Argentina S.A) Claro Argentina Movistar Argentina

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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